

PATIENTS IN FOCUS

Migraine treatment and perceptions

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Executive summary

It's been a transformative few years for migraine therapy, with a slew of new acute and preventive prescription drugs entering the market backed by game-changing efficacy data. But despite intense market competition and broad advertising pushes, most patients haven't tried preventive migraine medications, and nearly half haven't tried acute prescription drugs. Instead, patients are taking over-the-counter (OTC) options, and in some cases, not even recognizing migraine as a health condition that is serious enough to discuss with their doctors.

Those aren't the only issues drugmakers are contending with, either. Many patients who have tried new preventive migraine therapies, which belong to the calcitonin gene-related peptide (CGRP) drug class, aren't satisfied with them, and 39% of those who have tried them have stopped taking them despite continuing to suffer serious migraine symptoms.

Using Phreesia PatientInsights survey data collected in July 2021 from migraine patients checking in for their doctors' appointments, this report will examine which patients are not currently using prescription migraine treatment options and why, along with how pharma marketers can increase patient uptake of these breakthrough therapies.

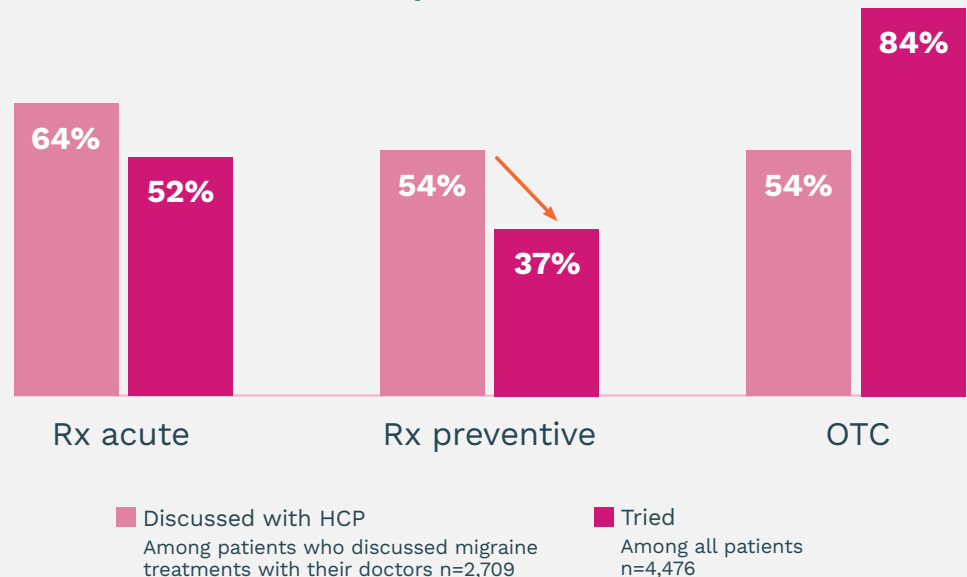


Introduction

It's no secret that migraine can be debilitating. Nearly three-quarters (74%) of surveyed patients reported that migraine has had a moderate to great impact on their day-to-day lives, and more than half (53%) said their symptoms have caused them to miss work or school.

But despite recurring disruptive symptoms—and an influx of available options, including AbbVie's Ubrelvy to treat acute migraine headaches, Amgen's Aimovig and Eli Lilly's Emgality to prevent them, and Biohaven's Nurtec ODT, which does both—a large swath of migraine patients don't use prescription therapies. Only about half of migraine sufferers (52%) have tried acute therapy, and only 37% have used preventive therapy.

What type of migraine treatments have you discussed with your doctor or tried?



63% of patients have not tried preventive medications

The good news for pharma companies is that most migraine patients are already talking to their doctors about their condition and discussing treatments. More than 75% of Phreesia-surveyed patients reported having talked about migraine treatment options with their healthcare providers, and within that group, 64% had discussed acute medications and 54% had discussed preventive treatments.

But while nearly 40 million Americans suffer from migraine, there are only about 2,000 certified headache specialists in the U.S. That means a significant number of patients are discussing migraine symptoms with their primary care providers, many of whom aren't fully informed on new migraine treatments.

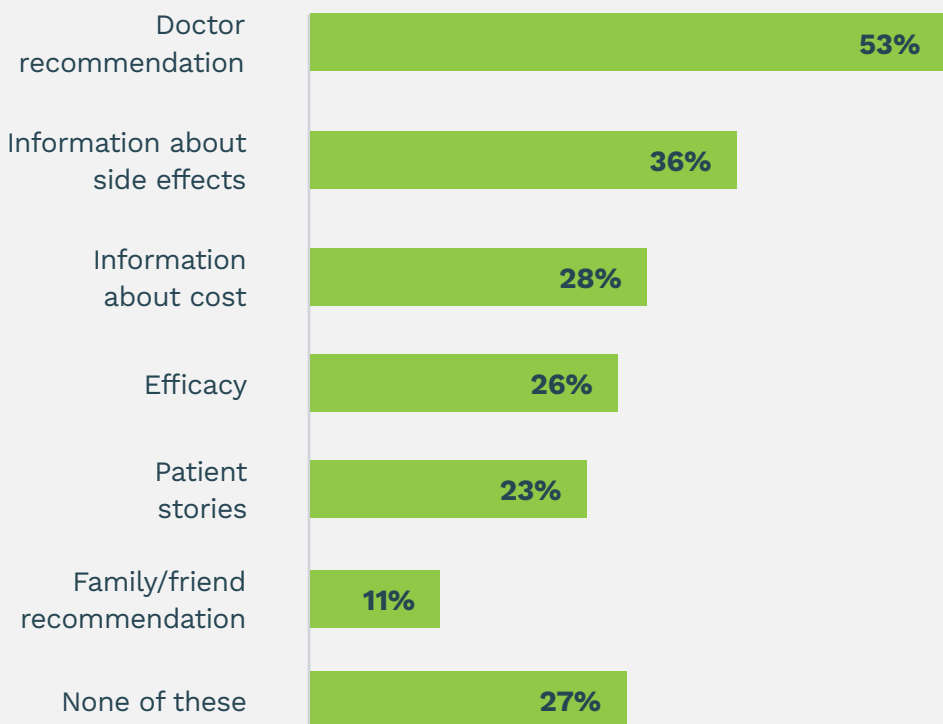
Driving prescription conversations

That knowledge gap may account for providers' enduring recommendation of OTC therapies for their migraine patients. Among surveyed patients who said they had talked to their doctors about their migraine headaches, 36% did not discuss acute migraine medications, and 46% did not discuss preventive treatment—sizeable percentages, especially considering how new prescription options for migraine have proliferated in recent years. And despite the changing treatment landscape, the same proportion of patients, 54%, reported discussing over-the-counter drugs and preventive drugs with their doctors.

Drugmakers need to bring primary care physicians up to speed on new migraine treatments, especially considering that physician recommendations go a long way toward convincing patients to give prescription migraine meds a try. Among surveyed patients who had tried a preventive migraine treatment, 44% said they did so because their doctor had suggested it—one of the biggest motivators behind migraine being too frequent or severe.

Additionally, when asked what would increase their interest in trying a new preventive migraine drug, 53% of patients cited doctor recommendations—well above the percentages of those who said information on side effects (36%), drug cost (28%) or efficacy (26%) would influence their decision to try a new treatment.

What information below would help increase your interest in a new preventive medication for migraine? Please check all that apply.



n=4,980

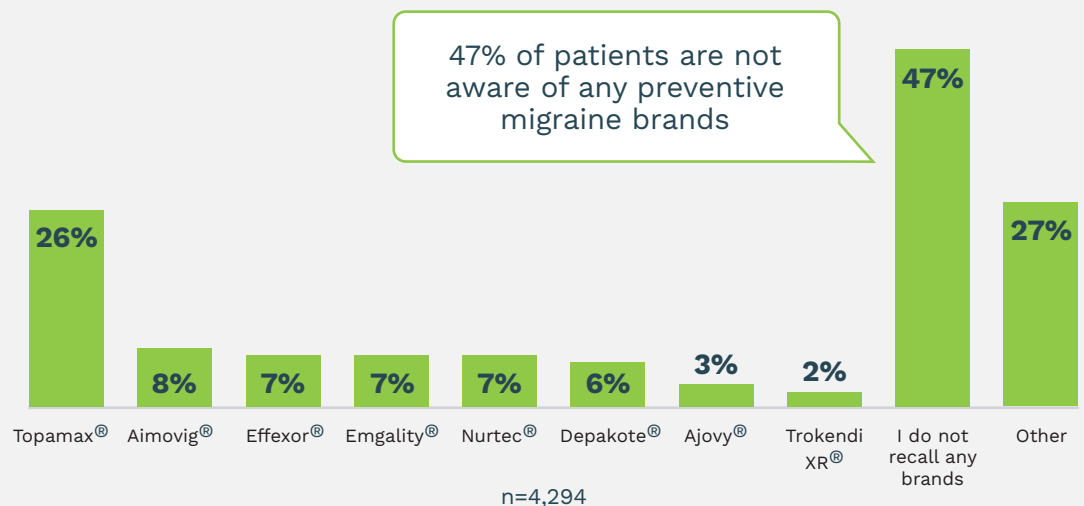
Boosting awareness and support

But it won't be enough for drugmakers to focus solely on educating healthcare providers; they'll also have to educate patients and arm them with the tools they need to participate in shared decision-making about their migraine treatment.

Patient self-advocacy is key for drugmakers looking to stand out in a crowded field. Fortunately, migraine patients are looking to play an active role in their care. For example, 25% of surveyed patients said they would find doctor discussion guides helpful, while 36% said they would find information on how a migraine medication works useful.

Meanwhile, makers of preventive CGRP migraine drugs, some of whom have already invested heavily in direct-to-consumer advertising, still need to work harder to achieve brand recognition, survey results showed. Nearly half (47%) of patients couldn't recall a single brand name in the preventive migraine category, and the leading brand name patients did recall, Topamax, is an older drug that gained approval for migraine in 2004. Aimovig led the new CGRP options in the survey, with 8% of patients recalling the brand for preventive treatment, while 7% recalled Emgality and Nurtec ODT and just 3% recalled Teva's Ajovy.

Which of the following preventive brands come to mind for migraine? Please check all that apply.



If preventive migraine therapy drugmakers can improve consumer awareness, they have a lot to gain—both in bringing in migraine patients new to the drug class and those looking to switch from their current preventive treatment. Survey data found that 40% of migraine sufferers who had never tried a preventive treatment said they were likely to do so in the next year, while 59% of patients who had already taken preventive migraine medications said they were likely to try a new preventive drug within that same timeframe.

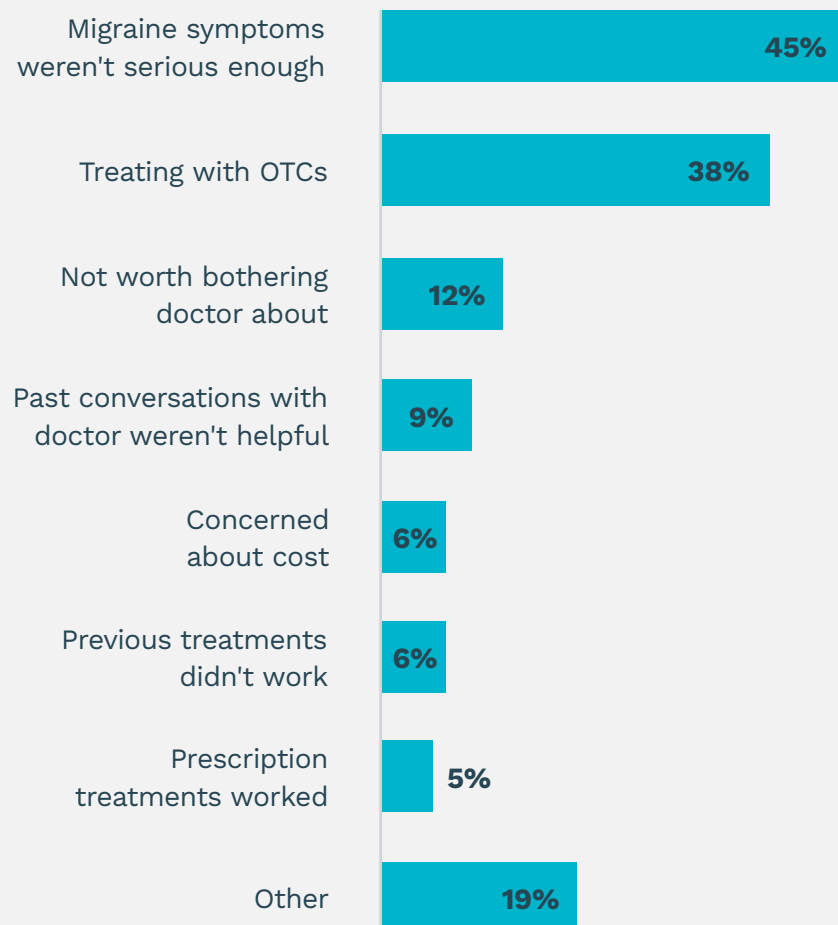
Activating patients and combating stigma

Pharma companies—especially those who manufacture acute migraine therapies, which patients tend to try before moving to preventive treatments if necessary—will also need to convince those patients who haven't talked to their doctors about their migraine headaches to speak up.

Nearly one-fifth of surveyed patients (19%) said they had never talked to their doctors about their migraine symptoms. The reasons? Among those who hadn't brought up migraine with their doctors in the last year, 45% said their migraine headaches weren't serious enough to discuss, 38% said they used OTC medications to control their symptoms, and 12% said their migraine symptoms weren't worth bothering their doctors about.

Why didn't you talk to your doctor about your migraine headaches last year? Please check all that apply.

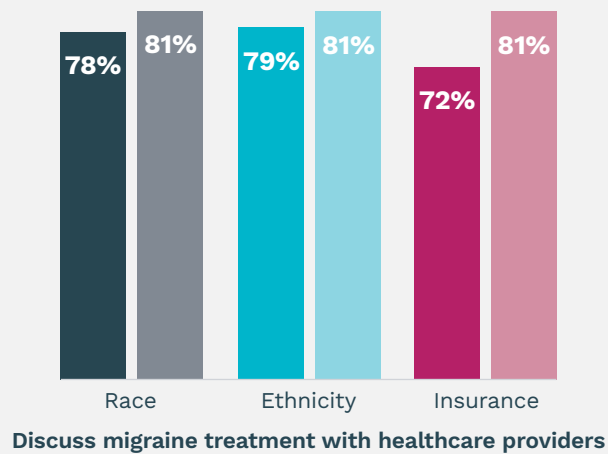
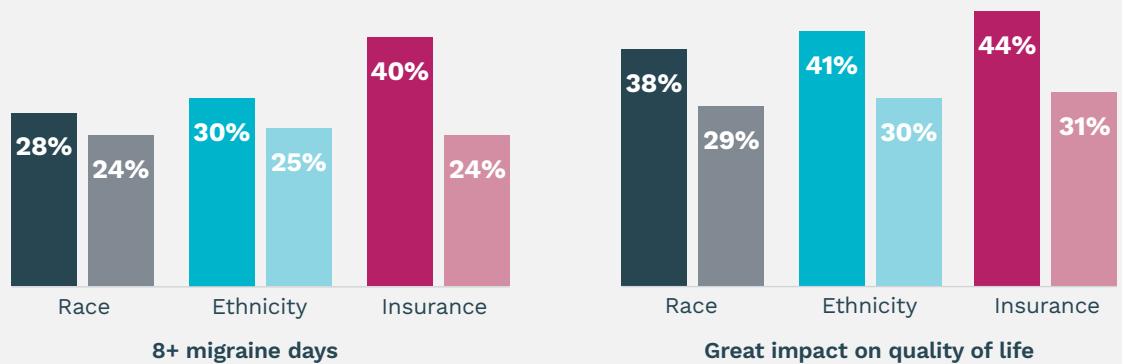
Among patients who did not discuss migraine with their doctors n=1,065



But these patients are suffering, and they might benefit from acute prescription treatment. Indeed, 64% of patients who hadn't discussed migraine with their doctors reported that migraine had a moderate to great impact on their daily lives. Nearly the same percentage (63%) of patients said they were unable to focus at work or school because of migraine, and 55% had missed work or school because of migraine symptoms.

The problem is even worse in underserved communities. Black patients, Hispanic patients and Medicaid beneficiaries are most affected by migraine, reporting more migraine days and a greater impact on their quality of life than other patients. But they're also less likely to discuss their migraine pain with their doctors.

Demographic deep dive



■ Black ■ White ■ Hispanic/Latino ■ Not Hispanic/Latino ■ Medicaid ■ Commercial

Metric	Black (n)	White (n)	Hispanic/Latino (n)	Not Hispanic/Latino (n)	Medicaid (n)	Commercial (n)
8+ migraine days	n=703	n=5,204	n=642	n=5,488	n=473	n=5,251
Great impact on quality of life	n=680	n=5,041	n=628	n=5,318	n=461	n=5,093
Discuss migraine treatment with healthcare providers	n=664	n=4,948	n=605	n=5,219	n=453	n=4,976

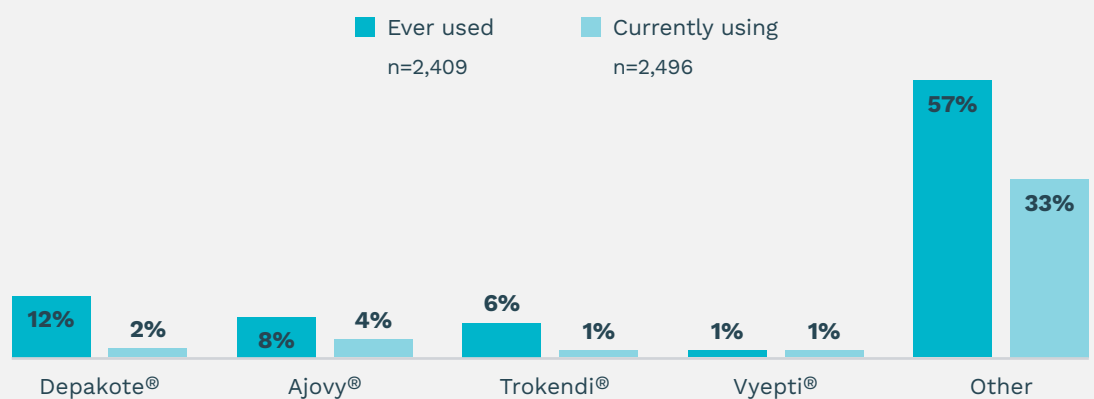
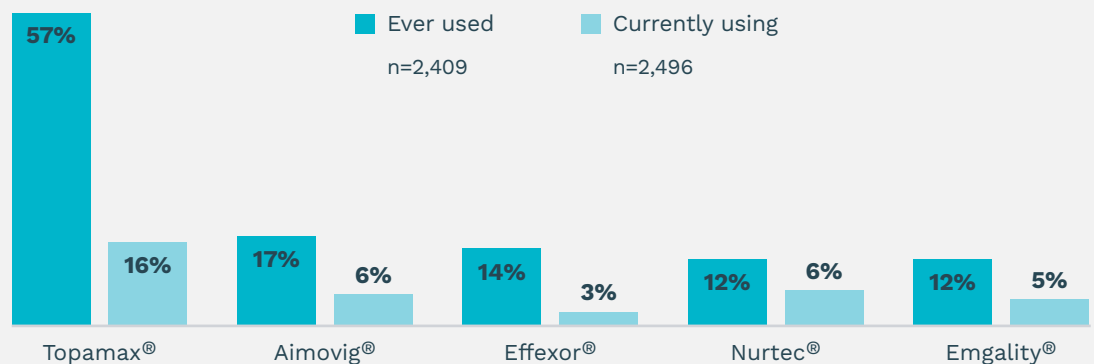
To break through to these patients, drugmakers should help them understand that they don't have to suffer through that pain. Because so many people deal with migraine—and to varying degrees—many patients also may feel stigma around seeking advanced care. Drugmakers can combat that stigma with messaging and imagery that reassures migraine patients that their symptoms are legitimate and encourages them to talk to their doctors.

Retaining patients

Preventive treatment drugmakers are grappling with an additional problem, as well: Migraine patients aren't staying on preventive therapies. Among those patients who reported trying preventive medications for migraine, 39% said they no longer took them.

Topamax saw the biggest dropoff among migraine drugs, with 57% of patients having tried the treatment, but only 16% reporting that they still took it. But newer CGRPs have seen dropoff, too: Only 6% of patients reported still taking Aimovig, although 17% had tried it; and 5% said they still took Emgality, down from the 12% who had tried it.

What preventive medications have you ever used or are you currently using to treat migraine?
Please check all that apply.

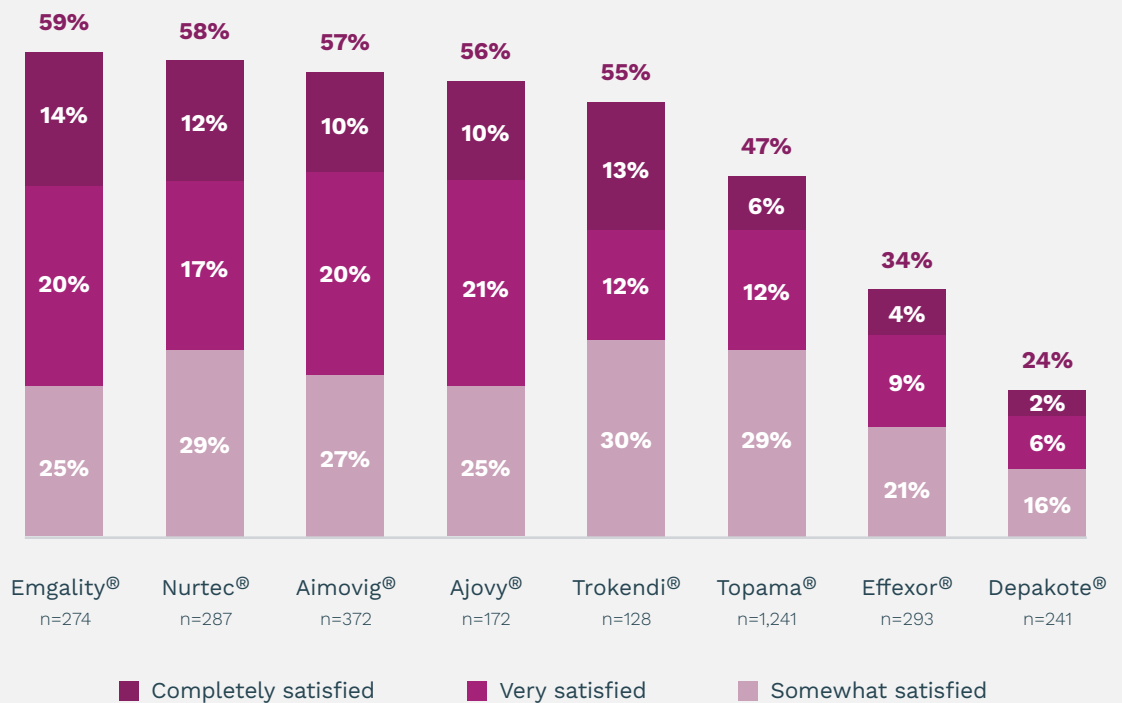


Among patients who have ever used preventive medication. Patients who declined to answer account for differences in sample size.

Furthermore, patients are not quitting preventive migraine treatments because their symptoms have disappeared. Slightly more than 30% of those who had stopped taking preventive migraine drugs said they still experienced migraine eight or more days each month, and 83% reported that migraine still had a moderate to great impact on their quality of life.

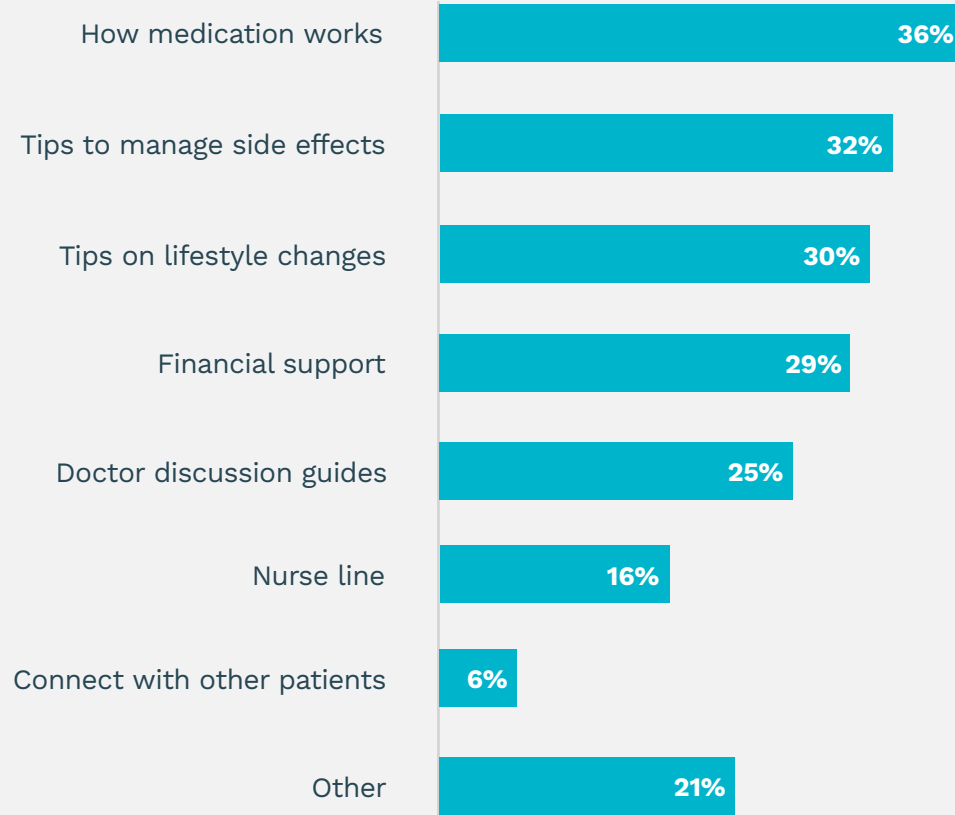
Those poor adherence rates aren't surprising upon closer examination of patient satisfaction with preventive migraine drugs. Just over half of patients who have taken Emgality, Nurtec ODT, Aimovig or Ajovy reported being satisfied with them, but the percentages of those who were completely satisfied with those drugs was much lower. Only 14% of Emgality patients said they were completely satisfied with the med, and that number dropped to 12% for Nurtec ODT and 10% for Aimovig and Ajovy.

Of patients who have tried a preventive treatment, how satisfied are you with these medications for migraine?



One potential reason for that dissatisfaction—and the leading reason migraine patients gave for discontinuing treatment—was their concern about side effects, which drove 28% of patients who tried preventive migraine meds to stop taking them. Drugmakers can allay those concerns with information on how to manage their products' side effects—a resource that 32% of patients said they would rank within their top three most helpful. Patients also ranked lifestyle tips and financial support for migraine therapies highly, so creating support materials on those topics also might help drugmakers retain migraine patients.

What kind of resources about migraine care would be most helpful? Please check up to 3.



n=3,950

Recommendations:

- ✓ Pharma needs to keep pushing to make sure that doctors—a top patient resource for trusted information—are aware of and recommending prescription migraine therapies
- ✓ CGRP drug manufacturers should empower migraine patients with information and resources that help them actively participate in treatment decisions
- ✓ Drugmakers should strengthen their messaging aimed at prescription-naïve patients—especially those in underserved groups—to encourage doctor-patient conversations and appeal to those who don't think their symptoms are serious enough to seek treatment (or treatment beyond OTC options)
- ✓ To retain their current patients, pharma companies need to make sure that those taking preventive migraine medications are aware of side-effect-related support services and information available to them; providing more medication and drug-cost information also may entice patients taking rival therapies to switch brands